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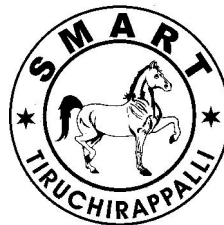
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# CASE METHOD OF TEACHING AND LEARNING

**Satya P. Chattopadhyay**

Arthur J. Kania School of Management, University of Scranton, USA

## **Abstract**

*This paper looks at the benefits of using case studies for teaching and learning. It demonstrates in particular the use of development of cases as a learning tool and offers an assessment of limitations of the case method as well as pros and cons involved for the teachers and learners.*

## **Why do we teach?**

As an educator for almost twenty years now, I have often asked myself this question. The answers I have come up with at various times fall into a number of categories: a. convey knowledge, facts and information to students to help them gain mastery of theories and their application, b. help improve students' skills in writing, analytical thinking, decision-making and ability to work in team environments, and c. Infuse in students the desire for life-long learning. In my solitary ruminations, I have come to the conclusion that it is the last that is the most satisfying and what makes my vocation worthwhile. To see a student blossom, and confidently go forward in life with a genuine interest in her or his work, willing and able to tackle complex problems and issues, and never failing to learn from each experience is the ultimate payoff for a teacher.

The obvious trap for a teacher is to get so involved in teaching the knowledge, theories and facts that the vital aspect of developing the maturity, poise and self confidence to take responsibility for their personal growth is neglected. The teacher slips into the role of being the sole purveyor of knowledge, whose prescriptions for problem solutions are the final word in any situation. The students' role is that of a passive vessel that is being filled with "learning," without any control over the process they are being subjected to. What this does is that it stifles the yearning to grapple with a problem, come up with multiple solutions and deal with the real world uncertainty associated

with leadership responsibilities. Vital in avoiding this debilitating trap is to get the students engaged and actively participating in a learning experience that prepares them to meet challenges that are yet to be faced, rather than be experts in handling problems that have been already identified and dealt with.

The greatest success of a teacher is to see the student take charge and go farther than they themselves would have gone on their own! The process of learning that makes this possible is when the teacher and the students share control of the learning experience. While the teacher may start out with an advantage, at some point, hopefully sooner rather than later, they are collaborating as equals in their quest to tackle a problem. Problem based learning in general, and case study approach in particular is a method of teaching and learning that can foster the development of an environment that fulfills this need.

## **Problem Based Learning and Case Studies**

Problem based learning is an instructional approach that challenges students to learn to work cooperatively in groups to reach solutions to real life problems. The problems, appropriately chosen, help to engage students' curiosity, initiate active learning and foster critical and analytical thinking. Such an approach can be implemented by involving students in field work and handling live issues. But the benefits of this approach are accompanied by the limitations of inability to structure the learning experience in such a way that the student apprentices are not

overwhelmed by a sense of inadequacy early on. A simulated version of the same experience, which lends itself to structure and focus on a few aspects of the problem at a time, while still retaining much of the richness of the original problem is arguably the better way to foster engaged and active student learning.

It is such a simulation of a real life problem situation, with students playing the role of protagonists that enriches their learning experience and aids in the development of their confidence and ability to critically formulate, analyze and resolve problems without the risk of causing actual impact on them is a case study. A case study is an adventure in thinking. Its writing requires wit, imagination, objectivity and most importantly, healthy respect for facts. The successful use of case study as a teaching tool in turn requires preparation, knowledge of discipline and methodological rigor.

A case is a description of an actual situation, commonly elaborating on a decision problem and normally written to represent the viewpoint of the decision maker. The student participants play the role of surrogate decision maker. Cases are very versatile and can be suitable illustrations of theoretical aspects, empirical aspects and methodological aspects or some combination of these. The limitations imposed can adjust any or all of the substantive, analytical and external validity of the solutions developed.

The degree to which substantive issues are clearly identified and linked to explicit concepts is a variable in the writing of the case. The degree of interdisciplinary pooling of models and the scope of synthesis necessary to accomplish learning goals can be adjusted in a continuum reflecting abilities of novice to expert students. The requirements for analysis of data also can vary in methodological and computational rigor that spans the goals of developing a single feasible solution to choosing an optimal one among a set of possible

scenarios. Finally, the presentation of the findings also can vary in the granularity of, and scope of information, presented in support of recommended solution. Ability to use audio-visual aids and persuasive communication technique are vital in developing poise and confidence in the student participants.

### **Case Writing as a Learning Tool**

Cases have been widely used as a teaching tool, but use of case development as a pedagogical tool is less prevalent. Never the less, requiring students to develop a case as part of the requirements of a course serves as an effective tool to impress upon the students the depth, complexity and richness of decision environments that the course focuses on. Students are made to identify the particular concept/s they will seek to illustrate in the course of developing a case. The management cycle of corporate operations of a company/institution chosen as the basis provides a range of problem/opportunity scenarios that can manifest in any of the stages of the management cycle: planning, organizing, staffing, implementing and controlling.

Students first study the field of the chosen area of emphasis paying special attention to the models and theories that make up conceptual backbone of the topic. Following secondary research on the parameters as they relate to the institution of focus, they are then able to proceed to do depth interviews of key personnel of the institution. Once specific problems/opportunities in the area of emphasis have been identified, the key personnel focus the attention of case writers on relevant information and sources which further supplement the research done on secondary sources. The student then prepares a draft of the case with a creative flair that weaves the available information into a creative challenge that gives up tantalizing clues to the problem domain, but stops short of providing an explicit decision problem formulation. A review of the draft, undertaken

jointly with the key personnel of the organization, serves two purposes. Firstly, a practical assessment of the students' domain knowledge is obtained and it is made sure that the concepts are adequately represented. Secondly, based on the review, permission is sought and mostly obtained to use the case further as a teaching tool for analysis. It is also required at that point a solution to the case situation be appended. The solution, wherever possible, includes the actual resolution, and in addition one or more solutions that turn out to be either more appropriate with 20/20 hindsight or appear to be more elegant and viable, based on subsequent developments as observed over time.

### **Case analysis as a teaching tool**

The degree of structure in using case analysis as a teaching tool spans a broad spectrum. A common format is a lightly moderated discussion of the case content following an in-home reading assignment, concluding with an effort to reach consensus on what will be done. A written report may or may not be a part of this exercise. However, the problem that is endemic with this approach is that of uneven preparation among the student participants, which significantly compromises the effectiveness of the exercise. So a more structured approach is suggested, that increases the likelihood of higher percentage of students who have read the case, and consequently raises the bar in terms of the discussion that follows and quality of the learning that results'. A case preparation note, described in the following paragraph, is a tool that can be effectively used.

A case preparation note is an assignment that is handed out in advance to the students, to be turned in at the "beginning" of the class where the case is to be discussed. It is a one page typed report that follows a very strict format. The students are put in the role of having to convince the teacher/discussion leader that they have read

the case, examined the information in the case critically, attempted to fit the case scenario to a model, and finally raised meta-issues that impact on the resolution of the decision problem. The benefit of the case preparation note is that it trains the participants in two very vital areas. The insistence on the exact structure described above specifically precludes the student from prematurely putting on paper a solution to the case and it forces them to deconstruct the case content and develop deeper understanding of the context and issues. While it does not necessarily stop them from thinking about a potential solution, not writing it down keeps them open to modifying their position or even buying into other solutions that can later be found to be better. The second benefit is an extension of the first. The students are expected to realize that more minds are better than one as subsequent discussions from a well prepared group of discussants are almost certain to bring out nuances and points of view that at least provide more compelling support for initial positions held, and often allow them to converge on solutions that are altogether different, but more acceptable none the less.

While it may be perfectly acceptable to end the case discussion with a recapitulation of the consensus solution and how it relates to the principles being modeled, sometimes the students maybe required to submit a written report, further extending the benefits of case method pedagogy. The written report provides a tool to assess students' ability to persuasively communicate a position on a complex situation, and back it up with qualitative and quantitative analysis of carefully screened information and decision criteria that are appropriate for the situation at hand.

### **Constraints and limitations of case method pedagogy**

The judicious use of case method pedagogy requires that users are aware of certain constraints that are part of it. To fit a complex real world situation into the time and resource

constrained classroom environment, it is imperative that assumptions have to be made to keep the case manageable, sacrificing reality somewhat. This is often compounded when cases with significant limiting assumptions leave students with a misleading impression that stands alone that sub-optimal solutions to problems are acceptable in real enterprises. On the other hand, to facilitate adequate secondary research to uncover information external to the written case, lack of adequate library support will likely constrain successful learning outcomes. Pointed reminders to the contrary by the teacher or the discussion leader can somewhat remedy this shortcoming.

A persistent problem in case method teaching and learning is uneven preparation of participants, and another is the tension between the competing emphasis required for conceptual, analytical and presentation aspects of the pedagogy. To its credit, case method reinforces concepts in practical settings, promotes synthesis of ideas, holistic thinking and supports critical decision making techniques. These positives make it well worth the extra time and effort that teachers must spend to successfully implement it in classrooms.

### **Conclusion**

Case method is a powerful pedagogical tool, which if used with appropriate degree of structure is beneficial to student learning and trains them in application of learnt concepts and models to pragmatic decision situations. The paper shows how both case writing and case solving can be used to foster student learning.

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